

MICROSOFT DYNAMICS CRM

Vision

Statement of Direction

November 2012

NOTE: The guidance included in this document reflects current release objectives as of November 2012. This document is not intended to be a detailed specification, and individual scenarios or features may be added, amended or deprioritized based on market dynamics and customer demand.

EXECUTIVE SUMMARY

Microsoft continues to see strong momentum and growth with Microsoft Dynamics CRM and Microsoft Dynamics CRM Online. We continue to lead with our strengths of productivity, flexibility and scalability to help businesses around the world drive results through our products and services.

This Statement of Direction (SoD) outlines the future direction and planned areas of innovation for Microsoft Dynamics CRM. The intent of this paper is to help our customers and partners establish appropriate plans and guidelines for their investments today, while keeping an eye on the horizon of future innovations being delivered by the Microsoft Dynamics CRM team. It is meant to be directional in nature – and articulates scenarios and solutions that are planned to be delivered over the next 36 months versus any particular product release or service update.

VISION

Business Applications need to be proactive, productive, ubiquitous and flexible.



CRM should be an enabler that detects trends, facilitates decisions and suggests actions that lead to successful outcomes



Deliver delightful user experiences that promote end-user productivity and demonstrate the rich, "better together" value of Microsoft technologies



Seamless experiences across sales, service, marketing and custom processes regardless of the choice of device, browser and location



Sustaining the "Power of Choice" and the ability to utilize cloud, on-premises and hybrid CRM deployments as a key point of customer value and flexibility

INVESTMENT AREAS

Beginning in December 2012 and over the next set of product and service releases, we will focus on developing innovative **applications** and intuitive user **experiences** delivered on a world-class technology **platform** to power your business.







APPLICATIONS

SALES FORCE AUTOMATION

Sales Force Automation (SFA) remains an area of high importance and investment for Microsoft Dynamics CRM. We plan to deliver compelling applications and solutions that continue to make sales professionals more productive in managing their work, collaborating with others, and ultimately, close more deals faster. With this focus, we plan to deliver the next generation of sales applications and services for:

- Prospecting
- Team Collaboration
- Quote, Order, and Pricing Management
- Planning and Management
- Revenue Performance Management

CUSTOMER SERVICE

We will increase our investment in Customer Service (CS) with heavy innovation and scenario focus. Over the next set of releases, we intend to develop a new agent desktop experience, deliver powerful knowledge management and search capabilities, and fuel the next generation of great customer experiences for organizations looking to provide service across multiple channels of engagement. Our planned innovation for Customer Service includes additional capabilities in:

- Knowledge Management
- Multi-channel Service
- Contact Center
- Installed-base Management

MARKETING AUTOMATION

Marketing Automation (MA) will become a major area of investment in future releases of Microsoft Dynamics CRM. Beginning with our focus on driving a new category of integrated marketing solutions, we plan to deliver new and compelling solutions for:

- Brand Management
- Marketing Resource Management
- Digital Asset Management
- Multi-channel Campaign Management
- Campaign Performance Analytics
- Customer Loyalty



EXPERIENCES

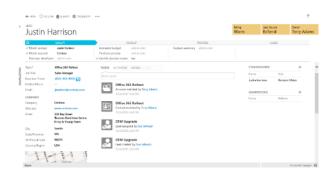
The needs of the modern business professional have expanded beyond a "one-size-fits-all" approach – our strategy is to provide our customers with the most natural and familiar user experience possible. Microsoft will invest across several dimensions to bring the user experience to new heights:

BROWSER EXPERIENCES

We will support a range of browsers across a variety of devices. Beginning in December 2012 Microsoft Dynamics CRM will support Internet Explorer, Mozilla Firefox, Google Chrome, and Apple Safari browsers.

USER EXPERIENCES

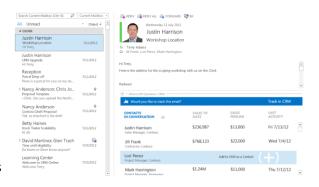
Microsoft Dynamics CRM will continue to invest in new, vibrant and engaging user experiences. These investments enable users to work in a task-based, process-driven paradigm designed to provide speed and simplicity for everyday work activities.



PRODUCTIVITY EXPERIENCES

Microsoft Dynamics CRM will continue to deliver a first-class experience for those who use Microsoft Office productivity applications and services across their devices.

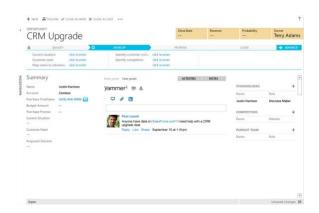
- New Microsoft Office productivity scenarios deliver projection and integration of key CRM information across Microsoft Office Outlook, Word, Excel and PowerPoint.
- Synchronization with Microsoft Exchange delivers email, calendar and contact integration with Microsoft Dynamics CRM.
- Microsoft Office 365 and CRM Online Administration will provide customers of Microsoft's Online Services with a unified administration experience for user, organization and billing management.



SOCIAL COLLABORATION EXPERIENCES

We will introduce new Social Collaboration capabilities to help organizations connect, collaborate and communicate with customers:

- Yammer serves as the social communication and collaboration fabric between employees, their partners and their customers.
- Skype and Microsoft Lync Communications will power additional contextual voice, video and chat communications for employees, partners and customers.



- *Microsoft SharePoint* will power next-generation content and knowledge experiences to strengthen supporting business processes.

DEVICE EXPERIENCES

Our device experiences will aim to deliver value across three patterns of investment:

- Essential Device Experiences provide real-time and offline access to Microsoft Dynamics CRM. These solutions will provide consistent experiences optimized for the platform and device of choice.
- Process-tailored Experiences will be designed for specific roles and business scenarios. Initially we'll focus on applications that are optimized for the sales professional whether they are in or out of the office with a layout and orientation specific to their needs. Other roles and experiences will follow similar patterns in subsequent releases.



PLATFORM

Microsoft Dynamics CRM is built on the Microsoft technology platform and is designed for flexibility and scale. Microsoft Dynamics CRM embodies the reality of a business solution from Microsoft. We embrace an open technology strategy which unifies and optimizes any investments you may have in Microsoft Office, SharePoint, Lync, Office 365, Windows Azure, SQL Server, Windows, Skype and Yammer but also preserves and integrates with your choice of applications, browsers, devices and platforms from other technology vendors. Future platform investments include:

- Security & Identity: We are committed to continually embracing industry and cloud standards in order to ensure that a robust set of practices and controls are in place to protect sensitive data. For more information please refer to http://crm.dynamics.com/en-us/trust-center.
- *Performance and Scale*: We will continue to drive higher performance and scalability benchmarks that allow us to meet the needs of a diverse range of businesses.



- *Integration*: additional capabilities to simplify integration of data across federated sources such as cloud and social. Furthermore we will continue to invest in industry-standard API's and authentication methods to streamline the development of custom integration code.
- Customization and Extensibility: continue to provide tools that allow customers to tailor and extend
 Microsoft Dynamics CRM to meet their unique solution needs. We are constantly seeking means to drive
 more configurability options to reduce the level of custom development and maintenance.
- *Big Data*: we will deliver new capabilities to help you find, transfer, format and study data from CRM combined with publicly available cloud data and services and social networks.
- Extended CRM Applications: Microsoft remains committed to delivering a rich and robust application framework designed to help customers extend and build additional customer-specific modules on top of Microsoft Dynamics CRM.

CONCLUSION

We believe there is no CRM provider that covers as broad a spectrum as Microsoft Dynamics CRM. We remain true to our heritage of delivering flexibility, productivity and deployment choice. Going forward we are convicted to invest deeply in our strategy to deliver the most powerful and impactful CRM in the marketplace. Guided by our principle that business applications must be proactive, productive, ubiquitous and flexible, our charter is clear: we will focus on bringing to market great user experiences, tremendous applications and a robust platform. We will continue to innovate and make it easy for our customers to leverage the great diversity of technology that Microsoft delivers to fuel today's and tomorrow's business success.

It is truly an exciting time for Microsoft Dynamics CRM! We look forward to keeping you informed on our progress as we evolve the innovations and exciting capabilities that Microsoft Dynamics CRM will deliver for you now and into the future.

U.S. and Canada Toll Free 1-888-477-7989, Worldwide +1-701-281-6500, www.microsoft.com/dynamics

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Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success.

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